Questions - All Taxpayers

(Provide related statements or other documentation.)
"You" refers to both taxpayer and spouse - ask your preparer if unsure about a question.

Lifestyle & Taxes

Did you pay or receive alimony in 2026? ☐ Yes ☐ No

Recipient's SSN: _____ Date of divorce or separation: _____

Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A) ☐ Yes ☐ No

Did you purchase a new or used energy-efficient, hybrid, or electric car, or van? ☐ Yes ☐ No

Would you like to allow your tax preparer or another person to discuss your return with the IRS? ☐ Yes ☐ No

Designee's name: _____ Phone Number: _____ PIN (any five digits): _____

Children & Education

Were any children born or adopted in 2026? (Provide statement for other expenses.) ☐ Yes ☐ No

Were any children attending college? (Provide Form 1098-T.) ☐ Yes ☐ No

Years of college completed: _____ Years of college completed: _____

Paid by you: Tuition $ _____ Books $ _____ Paid by you: Tuition $ _____ Books $ _____

Student loan interest $ _____ Student loan interest $ _____

Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable) ☐ Yes ☐ No

Address (Child 1): _____

Address (Child 2): _____

Name of provider: _____

EIN or SSN: _____ Amount paid $ _____

Did you make any contributions to a 529 plan in 2026? ☐ Yes ☐ No

Investments

Did you, or will you, contribute any money to an IRA for 2026? ☐ Yes ☐ No

☐ Traditional IRA ☐ Roth IRA

Did you roll over any amounts from a retirement account in 2026? ☐ Yes ☐ No

Did you sell or transfer any stock or sell rental or investment property? ☐ Yes ☐ No

Deductions

Did you make any charitable contributions in 2026? If yes, provide details. ☐ Yes ☐ No

_____

Did you purchase a brand new vehicle? ☐ Yes ☐ No

YTD Interest: _____ VIN Number: _____

Make: _____ Model: _____

Location of Final Assembly (You can find your vehicle's final assembly location on the manufacturer's label in the driver's door jamb):

_____

Business

Did you work from a home office or use your car for your business? ☐ Yes ☐ No

Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture? ☐ Yes ☐ No

Home

Did you purchase or sell a main home during the year? If yes, provide closing statement. ☐ Yes ☐ No

Did you make any new energy-efficient improvements to your home? If yes, provide details ☐ Yes ☐ No

_____

If you sold a home, did you live in it for the last 2 out of 5 years? If so and you are single, was the profit less than 250,000 or married filing jointly profit less than 500,000? ☐ Yes ☐ No

State information

☐ Full-year resident ☐ Part-year resident ☐ Nonresident

State of residence during 2026 and dates: _____

Do you rent or own your home? ☐ Rent ☐ Own